

**REQUEST FOR PROPOSAL OWNER REPRESENTATIVE SERVICES FOR THE CITY HALL  
FOUNDATION RESTORATION PROJECT  
MILWAUKEE, WISCONSIN**

**General Scope of Services**

Provide owner's representative services for the City Hall Foundations Project for the City of Milwaukee. Owner's representative services include oversight and monitoring of the design builder's investigation/ preliminary engineering, design development and preparation of construction documents, and construction and closeout phases of this project. Owner's representative services will also include assisting the City to determine and monitor the participation provisions of the design builder. This project will be awarded on a "not to exceed basis" billed using hourly rates confirmed in the contract.

The proposed project delivery method is Design Build. It is the City of Milwaukee's intent that the Design Build RFP will be issued in the 2<sup>nd</sup> quarter of 2010 and that the successful owner's representative will be part of the team reviewing proposals.

Please see attached the scope of services that is required by the City of Milwaukee for this project. Your proposal should be inclusive of all services described below; any submissions which are not inclusive of all services described below may be rejected.

**Project's Time Schedule**

The City plans on commencing the project in the 2<sup>nd</sup> quarter 2010, with a total project duration of 30 months. A pre-design phase of approximately 2 months, a design period of approximately 12 months, a construction period of approximately 18 months and a project closeout period of approximately 4 months.

**Project's Budget**

The current budget allocated to this project is \$14,700,000.00, which includes all project costs (including design, construction and city costs).

**SCOPE OF SERVICES TO BE PERFORMED BY THE OWNER'S REPRESENTATIVE**

**Overview**

The owner's representative will manage and/or perform all services required by the proposed scope of services during the investigation/preliminary engineering, design development and construction documents, and during construction of the project as determined by the owner (City).

**Part 1      General**

- a. Review the needs and requirements of the project based on information provided by the owner. Confirm your understanding of the scope of the project, analyze potential problematic issues and advise the owner of possible solutions.
- b. Visit the site to become familiar with the project site and its surroundings. Make reasonable efforts to verify the accuracy of any existing conditions related to the project. Advise the owner of additional studies including; soil, environmental, utility, surveys, testing, etc.
- c. Prepare a milestone schedule of activities for the project, which will, as a minimum include the following:
  - Owner review and approval milestones
  - Consultant selections (design professionals, special consultants, land surveying, geotechnical, testing services, other).
  - Planning phase
  - Design phase
  - Governmental and other agency approvals
  - Historic Preservation Reviews
  - Infrastructure improvements
  - Construction procurement phases
  - Construction phase
  - Equipment design, procurement and installation phases
  - Systems commissioning and close out
  - Start-up and occupancy
  - Move-in
- d. Produce a "Responsibility Matrix" which addresses and identifies all active roles for key individuals and entities involved in the project.
- e. Assist the owner, design builder and other owners' consultants in the preparation of a Master Project Budget.
- f. Prepare a Monthly Progress Report, which will relate to the status of the project through the duration of the project.
  - i. Executive Summary – include a summary of financial status, highlights of major events and a schedule summary.
  - ii. Status of Construction – summarize construction activities and identify known and potential delays.

- iii. Outstanding Items – include items to be completed by the owner's representative, the design builder, specialty contractors and other consultants.
  - iv. Budget Status Report – include a Master Project Budget which will include a summary of anticipated costs and status of scope changes that are approved, pending, and/or anticipated.
  - v. Reconciliation of project expenditures to cost reported on City's FMIS accounting system.
  - vi. Schedules – include an updated Milestone Project Schedule.
  - vii. Anticipated Project Activity – indicate, in narrative form, the activities of the project in the upcoming month, actions to be taken during the period, and any scheduled governing agency reviews/approvals, etc.
  - viii. Monitoring of participation provisions of the design builder, per the requirements stipulated in Exhibit D(i) – (vii).
  - ix. Other – include such additional or revised information as required by the owner.
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- g. Prepare quarterly executive summary reports and present to the required entities through the duration of the project.
  - h. Coordinate and consult as necessary with other providers of professional services engaged by the owner.

**SCOPE OF SERVICES TO BE PERFORMED BY THE OWNER'S REPRESENTATIVE**

**Part 2      Task I – Investigation/Preliminary Engineering Phase & Task II – Design Phase Services**

- a. To the extent required by the owner, assist/prepare: requests for proposals for services of design builder and other professionals; solicit and review proposals from such design builder and other professionals; assist in the preparation of contracts for the retention of such design builder and other professionals; and recommend selection of such design builder and other professionals. Review/negotiate, with owner and its legal counsel, scope revisions within professional service agreements and help resolve disputes relating to such scope revisions with such design builder and other professionals.
- b. Provide financial monitoring of the project including the following:
  - i) Prepare an overall project budget and update as necessary.
  - ii) Preparation of detailed comparative construction cost estimates for the investigation/preliminary engineering, design development and construction documents, and the construction.
  - iii) Prepare detailed comparative cost estimates for all contractor proposed change orders exceeding \$25,000 in value.
  - iv) Prepare a cash flow analysis based on the latest information and update as necessary.
- c. Review the plans, drawings, specifications and such other documents as prepared by the design builder for cost, constructability, adherence to schedule and consistency with the program. Confer with and advise the owner of variances and recommendations for corrective actions to remedy any problematic issues. Assess and advise the owner of impacts to the project budget and project schedule.
- d. Participate in value engineering exercises and evaluate proposed building design systems as to quality, first cost, constructability, and availability.
- e. Consult with the owner regarding issues that impact the constructability and feasibility of the project.
- f. Prepare an evaluation and recommendation for each general and specialty contract award and submit in a timely manner to the owner for approval.
- g. Expedite approvals and coordination issues with local agencies to obtain any required permits, licenses and other approvals for the project.
- h. Verify that the milestone schedule requirements and other known and reasonably foreseeable steps necessary to perform and complete the project have been included and/or accounted for within the contract documents.
- i. Schedule and attend all design review meetings and review the design builder's agenda and minutes for accuracy and correct any errors within such documents.
- j. Conduct periodic progress meetings (bi-weekly thru the duration of the project) with the owner, and the appropriate design builder team members and other owner consultants.

- k. Review applications for progress payments and final payments, and all documents in support of such applications and make the appropriate recommendations to the owner.
- l. Engineering; Review and evaluate proposed design solutions.
- m. EBE/RPP/Apprenticeship/Prevailing Wage: Provide professional services for determining the minimum requirements and monitoring participation provisions of the design builder. (Per Exhibit D(i) – (vii))

**SCOPE OF SERVICES TO BE PERFORMED BY THE OWNER'S REPRESENTATIVE**

**Part 3 Task III – Construction Phase Services**

- a. Monitor and coordinate the activities of the design builder and other consultants for the completion of the work in accordance with the owner's objectives for cost, schedule and quality.
- b. Schedule and conduct and/or attend pre-construction, construction and progress meetings to discuss matters of procedures, progress, problems and scheduling of the construction phase of the project.
- c. Review and update the Milestone Project Schedule monthly.
- d. Periodically monitor the progress and performance of the design builder, specialty contractors and other consultants. Give notice and recommend courses of action to the owner if the contractual requirements of the above mentioned entities are not being fulfilled.
- e. Review and update the Master Project Budget monthly.
- f. Recommend to the owner necessary or desirable changes to the project; review requests for changes by design builder, specialty contractors and other consultants; assist in negotiating proposals; determine whether changes are necessary, reasonable and accurate; and submit recommendations to the owner for approval.
- g. Review applications for progress payments and final payments, and all documents in support of such applications and make the appropriate recommendations to the owner.
- h. Assist in obtaining required governmental and regulatory agency permits or approvals, fee waivers (if applicable), and resolving code or regulatory disputes required for the work. Advise the owner of potential delay impacts to the Milestone Project Schedule in this regard.
- i. Monitor and confirm that the design builder maintains the following documents: a record copy of all contracts, drawings, specifications, addenda, change orders and drawing modifications, shop drawings, product data and samples, handbooks, manuals and instructions and related materials required to be kept and maintained for the project.
- j. Assist in coordinating all aspects of the work with any public agencies or utility companies involved in the project.
- k. In the event that an interpretation of the meaning and intent of the contract documents becomes necessary during construction, ascertain your professional engineers' interpretation and transmit such information, along with a recommendation, to the owner.
- l. Review the adequacy of supervision, personnel and equipment and the availability of necessary materials and supplies. Where adjudged inadequate, direct that the necessary actions be taken to correct the deficiencies.
- m. Monitor and review the design builder's quality inspection control system so that the required standards of construction are achieved.
- n. Monitor the design builder's review of all testing required by the technical sections of the specifications and applicable codes and regulations for compliance with the contract documents.

- o. Monitor the flow of all documents and materials for proper sequence of approvals so as not to delay the progress of the work.
- p. Review all scope changes proposed by the design builder, trades subcontractor and specialty contractors, and make recommendations to the owner for approval.
- q. Monitor all scope changes during construction to ensure compliance with approved revisions.
- r. Weekly site inspections and field reports.
- s. Final site inspection and punch-list process.
- t. EBE/RPP/Apprenticeship/Prevailing Wage – Professional services for monitoring participation provisions. (See Exhibit D(i)-(vii))

***SCOPE OF SERVICES TO BE PERFORMED BY THE OWNER'S REPRESENTATIVE***

**Part 4 Project Close Out**

- a. Monitor the procedures for conducting a comprehensive final inspection of the project to verify that the materials furnished and work performed are in accordance with the contract documents.
- b. Receive from the design builder, specialty contractors and deliver to the owner all guarantees, warranties, operating and maintenance manuals required by the contract documents. Ensure that the design builder coordinates equipment and systems training sessions for owner's personnel.
- c. Monitor the design builder's procedures for expediting the preparation of "as-built" drawings and operations and maintenance manuals in accordance with the specifications.
- d. Assist the owner, as directed, with the procurement of services, planning and implementation of temporary moves/relocations of any City agency.



**Consultant's Organization:**

The control and supervision of all aspects of this project shall be under the direction of a project manager who has sufficient experience in this type of work to oversee and manage the project. The project manager shall be assigned to this project until all work has been completed or until the City agrees in writing that he/she may be replaced or removed.

A competent team of staff, adequate in number and experience to perform the scope of work herein described, shall be assigned to this project to accomplish the work within the stated time schedule.

**Submission Requirements:**

**Prospective consultants shall submit the following information assuming that the project will start in the 2<sup>nd</sup> quarter of 2010. These requirements must be submitted in the order listed below to simplify the review of proposals:**

1. Consultant's understanding of the scope and intent of this contract.
2. Firm credentials and experience (1 page description from the prime consultant and each subconsultant) related to owner representative services for similar scale and scope of project. Describe your prior experience of this project scope and identify key contact persons with telephone numbers.
3. Demonstrate your capacity to complete this project within the desired time schedule and the managerial method proposed for executing the work. Include.
  - Number of qualified professionals and managerial personnel committed to the project and responsibilities.
  - Proposers should provide a project team organizational chart along with details on the experience of each staff person that will be working on the contract that is awarded. The City requests one person to be the primary point of contact. This person must be familiar with all aspects of the project.
  - Detailed resume of key members and their relative experience.
  - Detailed resume of key members of sub-consultants and their relative experience.
  - Describe your working relationship with any sub-consultants assigned to these projects.
4. State your fee for the owner's representative services as described in the scope of services. Include:
  - Lump Sum "Not to Exceed" Fee.
  - Proposers must include a list of labor rates that they will charge for the duration of the contract for all employees, from professional to support staff. Proposers must also provide a breakdown of the anticipated time and cost that each category of staff will be charging the City. (See Exhibit C, i & ii)
  - Overhead rates and other expected charges, including reimbursables.

5. Provide statement of no conflict of interest regarding this project
6. Professional liability insurance coverage: \$2,000,000 any one claim and in annual aggregate
7. In accordance with Chapter 360 of the Milwaukee Code Ordinances, Emerging Business Enterprise (EBE) participation of 18% in this consulting contract is required. Indicate in your proposal how your firm intends to meet this requirement. Any firm(s) utilized as an EBE must be certified by Equal Opportunities Enterprise Program as a City of Milwaukee EBE. (See Exhibit E)
8. In accordance with Chapter 365 of the Milwaukee Code of Ordinances, the application of a Local Business Enterprise (LBE) preference is required in all contracting activities of the Department of Public Works, unless contrary to federal, state or local law or regulation. (See Exhibit F)
9. Examples of project management tools and report formats used for cost control, schedule control and reporting on the progress of a project.
10. Confirm that you have in-house estimating or a professional estimating consultant on your team for all construction disciplines and show examples of your detailed cost estimating at all levels of design.
11. Affidavit of Compliance – Disclosure of participation in or profits derived from slavery. Please see the attached form, Exhibit H. Complete the form and return it as part of your RFP submission.
12. Owner's representative RFP timeline
  - RFP advertised March 18, 2010
  - Proposals due April 8, 2010
  - Proposals short listed to minimum of 3 firms April 22, 2010
  - Interview and Award May 20, 2010
13. If your firm is selected as the owner's representative for the City Hall Foundation Project, you are not allowed to submit a proposal for the Design Build RFP for the same project.

Please see attached the following exhibits;

Exhibit A – General Background of the Project

Exhibit B – Outline of the Tasks required of the successful Design Builder

Exhibit C – Staff Breakdown Matrix

(i) Cost Breakdown

(ii) Time Breakdown

Exhibit D – Summary of Professional Services for Monitoring Participation Provisions

(i) Bidding and Construction Phase Requirements

(ii) Owner's Representative Provisional Requirements

(iii) EBE Monthly Report Form D

(iv) Contractors Time Report

(v) Prime Contractor Affidavit of Compliance with Minimum Wage Scale and Special Area Worker Hours Provisions

(vi) Subcontractor Affidavit of Compliance with Minimum Wage Scale and Special Area Worker Hours Provisions

(vii) Proposed Resident/Apprentice Utilization Form

Exhibit E – EBE Provisions

Exhibit F – LBE Provisions

Exhibit G – RPP Provisions

Exhibit H – Anti-Slavery Affidavit

All EBE, LBE, RPP and Apprenticeship provisions can be found on the Department of Public Works web site at [http://www.mpw.net/services/bid\\_notices?All+notice\\_num](http://www.mpw.net/services/bid_notices?All+notice_num)

Please ensure you have reviewed and fully understand the exhibits before responding to this RFP.

**Submittal:**

This RFP is issued by the City of Milwaukee, Department of Public Works, and the Facilities Development and Management Section. The Director of Facilities Development and Management Section is the sole point of contact for the City of Milwaukee during the selection process.

Your proposal is to be submitted no later than 4:00 P.M. on Thursday April 8, 2010. All proposals will be reviewed by a team named by the City. The team will recommend a successful proposer to the Commissioner, and a contract will be executed by the parties.

The proposer is responsible for any costs associated with the development of a response to this RFP.

All completed responses to this RFP will become the property of the City and as such are subject to the State of Wisconsin Public Records Law upon completion of contract negotiations.

Submit Ten (10) copies of the proposals to the attention of Mr. Venu J. Gupta, Director of Facilities Development and Management Section.

Proposals should be delivered to:

Jeffrey S. Polenske, PE  
City Engineer  
Infrastructure Services Division  
Department of Public Works  
841 N Broadway, Room 701  
Milwaukee, WI 53202